Mass Updates: Price, Cost, and Field Updates Guide

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Overview of Mass Updates

Mass Updates gives you the power to change prices, costs, and other information for large groups of items all at once. If your pricebook is well organized, Mass Updates can greatly simplify pricebook management and help you save time.

Mass Updates **Tree View** allows you to quickly and easily filter to the items that need updating, and the various utilities in Mass Updates not only allow for changing tree info and costs/prices, but also allow you to add items to **Loyalty Campaigns**, **Buydowns**, or **System Discounts**.

1. **Mass Update Filters –** Multiple options for filtering your Mass Updates view to the items you need to see
   a. **Tree View –** Shows tree information for the entire pricebook; allows for each heading to be "expanded" to see sub-headings. Clicking any heading/subheading will filter to items in that group.
   b. **Hierarchical view –** Allows selection and filtering of items by selecting the **Major Category**, then the **Category** etc. that you wish to filter to.
   c. **Filters –** Allows Mass Updates to be filtered by department, price, cost, or any other tree information.
2. **Pricebook Zone/Vendor Selector –** Allows you to choose which Pricebook Zone your changes will affect as well as which Vendor and Vendor part cost changes affect.
3. **Mass Updates View –** Shows all items that will be affected by any changes made.
4. **Tool Selection –** From **Standard Prices**, to **Average Cost**, this is where to find all the tools used in Mass Updates

Understanding Tree Information

Tree Information can be set up on the individual item when it is created, or through Mass Updates. The **Tree View** in Mass Updates is derived directly from the information entered in the Tree Information section in **Item Details**. See below:
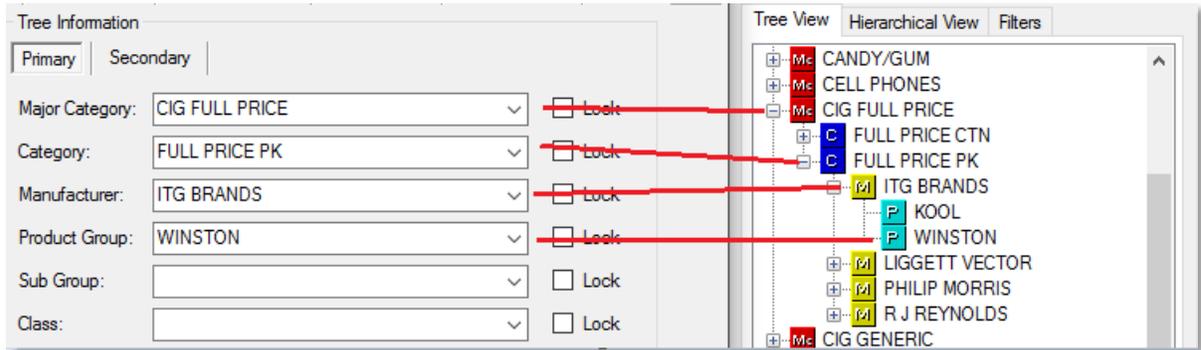

Ultimately, it's best to have items grouped together if they have the same prices. In the picture above, clicking the **Winston** heading in Mass Updates will filter to all Winston packs that have the same price. This way, if the prices change, we can click our **Winston** heading, and update the prices for all full price Winston packs all at once.

Standard Price Changes

1. In **Director**, choose the **Pricebook** module.

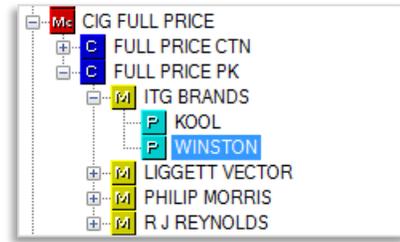2. Then, choose the **Mass Updates** option from the menu ribbon.
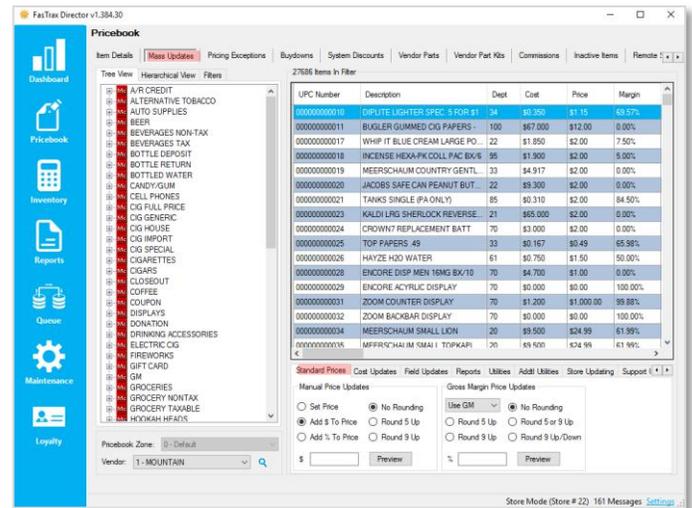
3. Make sure **Standard Prices** is selected in the tool selection ribbon.

4. Filter to the items needing a price change by clicking the corresponding heading in the Tree View.

> Remember to verify that you have selected the correct **Pricebook Zone** before making any changes.

5. Select the type of price change to be done:

- **Set Price** – changes the price to the entered value
- **Add $ to Price** – adds the entered value to the current price
- **Add % to Price** – increases the current price by the entered percentage
- **Gross Margin Price Updates:** Sets the price based on the existing cost and the entered percentage. Allows for selecting to **Use GM** or **Use Markup**.
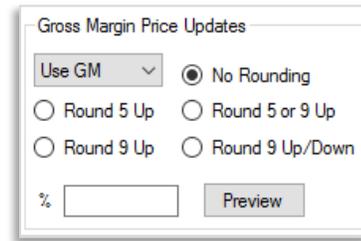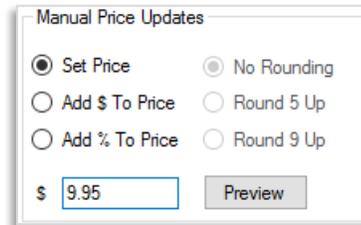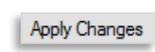
6. Once everything is entered as you need it, click the **Preview** button.

7. Using the **Change Preview** window, verify that the change is correct. Here, you can remove any items if needs be, or change the affected Pricebook Zone.

8. Click **Apply Changes**

> If you have changes that don't need to take effect yet, choose the date and time for them to take effect, and click **Schedule** instead of **Apply Changes**

Mass Cost Updates

1. After logging into **Director**, choose the **Pricebook** module.

2. Choose the **Mass Updates** option from the Menu Ribbon, and go ahead and **Filter** to the items you wish to update
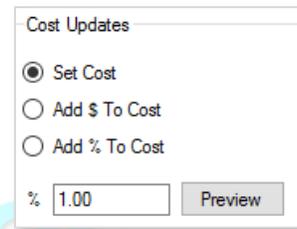
3. Choose the **Cost Updates** tab on the tool selection ribbon.
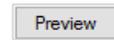
4. Select the type of cost change to be done:
   - **Set Cost** – replaces the current cost with the one entered in the blank.
   - **Add $ to Cost** – adds the amount entered to the current cost
   - **Add % to Cost** – increases the cost by a percentage of its current value

5. Choose whether the cost change will **Apply to Vendor Part**, and choose which **Vendor** this will apply to in the dropdown.
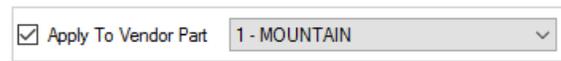
6. Once all options are set the way you need them, click **Preview** to continue.

7. Using the **Change Preview** window, verify that the change is correct. Here, you can remove any items if needs be, or change the affected Pricebook Zone.

8. Click **Apply Changes**

   If you have changes that don't need to take effect yet, choose the date and time for them to take effect, and click **Schedule** instead of **Apply Changes**

Mass Field Updates

The **Field Updates** tool in Mass Updates can be used to update any of the 14 **Tree Information** fields, as well as the following fields:

- Department Number
- Link PLU
- POS Text
- POS Flag Name
- QOH Reorder Point
- Override Order Days
- Override Type

1. After logging into **Director**, choose the **Pricebook** module.

2. **Choose** the **Mass Updates** option from the Menu Ribbon, and **Filter** to the items you wish to update.
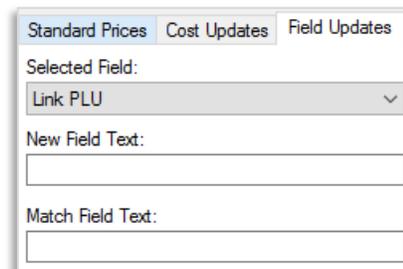
3. Choose the **Field Updates** tab on the tool selection ribbon

4. Choose the update options
   - **Selected Field** – the name of the field to be Mass Updated
   - **New Field Text** – The new information to be put in the Selected Field.
   - **Match Field Text** – Used to tell the system what text to replace when updating the Selected Field

   The **Match Text** field is only used to when the **Change "Match Text" to "New Text"** option is used below, and can be left blank if not using that button

5. Click **Set Selected Field to New Field Text** to update all items in filter,

   Alternatively, click **Change "Match Text" to "New Text** in order to only update the selected field **only** where the text currently in the field matches the **Match Text**

For assistance with configurations, please contact Technical Support at Support@FasTraxPOS.com